University of Portland

Information Services

2024 Strategic Plan

Executive Summary

The purpose of the Information Services department at the University of Portland is to make UP a better place to teach, learn, and work using technology. We do this by providing excellent technical and audiovisual support, investing in our technology and security infrastructure, and ensuring that enterprise and academic applications are reliable, secure, and usable. This requires not only a dedicated and skilled staff, but a road map for how we can continue to improve and prepare for the future. This document reflects those efforts as we prepare for 2024 and beyond.

Our process for identifying our priorities considered our current strengths and weaknesses as well as factors in our current and future environment. We examined how our efforts must enable and support the strategic initiatives associated with the current University Strategic Plan and the strong need to deliver results efficiently to get the most out of every dollar and staff hour.

From the many possibilities of potential goals, we have chosen three primary objectives that IS will pursue across our entire department. Progress on these goals will provide not only a clear improvement on our day-to-day operations but also help set a foundation of skills that will make future objectives more achievable. Our departmental objectives for 2024 are:

- Deliver a consistently great support experience
- Support and shepherd UP's data journey
- Cultivate project and process management

In this document, we also identify an initial set of measurable goals for the 2024 calendar year. Completion of these goals (or even progress towards completion) serves to improve our performance on the stated priorities above. On at least a quarterly basis, we will review our progress towards these goals, adjust our targets if they turn out to need it, and add entirely new goals as we see opportunities.

As we look to the longer-term strategy of our department, we are also identifying key areas in which we will need to commit a sustained effort to meet the future needs of the university:

- Leadership team: Make UP a great place for a tech career
- Academic Technology team: Reinvigorate academic technology support
- Security workgroup: Build our long-term cybersecurity capabilities

Critically, all this strategic improvement must happen while we also continue to operate daily to provide support, administer systems, and complete projects. The limited time we have to advance larger goals makes it that much more important that we have in place this strategic framework to coordinate and focus our efforts, particularly given that our expected budget throughout 2024 will require us to stretch every dollar as far as possible.

Alignment with the UP Strategic Plan

The University of Portland Strategic Plan for 2022-2027, *Hope, Renewal, Transformation*, outlines six key themes that connect the University's mission and values to the needs of the coming years. These themes are:

1. Focus on engaged learning and experiential education grounded in ethics.
2. Embrace and renew our Catholic identity and Holy Cross charism to grow and enhance the University of Portland community, foster faith formation, and promote holistic community health.
3. Committed to the tenets of Catholic Social Teaching, the University community will strengthen its efforts in the areas of diversity, equity, inclusion, justice (DEIJ), and access.
4. Optimize student enrollment and support student success outcomes across the University.
5. Enhance and expand our human, physical, and financial resources.
6. Expand and communicate the ways in which the University's Catholic mission and identity animate its students and alumni to make a meaningful impact on the world.

Information Services plays a part in supporting many of the initiatives already underway in each of these themes. In addition, the Information Services Strategic Plan has been designed to prioritize objectives that best align with the UP themes and develop our capacity to support these efforts. Each Information Services objective below includes some exploration of that alignment with the UP themes.

Strategic Objectives

Departmental Objective #1: Deliver a consistently great support experience

The need: Using technology will inevitably mean sometimes needing to seek answers or support, and one of the best ways we can serve our mission as an information services team is to make that support as smooth and positive an experience as we can. Effectively doing so requires not only fantastic technology solutions (which we have many of) but also clear and accessible pathways for faculty, staff, and students to find and use those solutions.

This improvement applies across the full support lifecycle. We need to improve the visibility and accessibility of IS resources, improve our self-service resources, and to use key systems like ServiceNow to gather and track key performance indicators so we can measure the quality of our service.

Alignment to the UP strategy: To be an **employer of choice**, which is one goal stated in the Strategic Plan, UP must deliver a great technology support experience to new and existing employees. A great technology support environment also reduces barriers for students, potentially improving retention and reducing melt. Importantly, the more we can reduce the time people spend struggling with technology, the more time they can spend on far more valuable work serving the University's mission.

Measurable Goals for 2024:

1. **Complete key projects that improve systems critical to customer experience**
   - Implement 5 enhancements (such as new procedures or workflows) in ServiceNow that should speed up ticket resolution times or reduce the number of tickets (led by Customer Support team, completion by end of 2024)
   - Review and document processes that create automated directories based on data from the Banner database, and establish practices to make sure that information is kept up to date. (led by Enterprise team, completion by end of 2024)
   - Upgrade Liferay to 7.4, and using it redesign Pilots.UP to be a more accessible intranet for faculty, staff, and students (led by web team, completion before Fall term 2024)
   - Complete migration of Self Service Banner from 8 to 9. (led by Banner and Enterprise teams, completion by end of February 2024)
   - Implement a new "SOS" button on the classroom AV control screen to make it faster and easier to report a problem with classroom technology (led by AV team, by end of 2024)

2. **Write or update Knowledge Base articles in ServiceNow and work to make them more visible to the UP community.**
   - 10 new articles on common Banner questions (Banner team, by end of June 2024)
   - 15 new articles on common Cascade questions and tasks (Web team, by end of February 2024)
   - By the end of 2024, have at least 3 months where there are 150% of the total hits to Knowledge Base articles compared to the corresponding month in 2023.

3. **Improve existing internal processes and practices to improve customer service**
   - Refine process for handling license renewals and recurring payments such that every single invoice is paid on time in 2024. (procurement team/CIO, yearlong goal)
   - Review and update the ServiceNow responsibility matrix (web team/support team, by end of February 2024)
   - Standardize and document actions AV student workers should take to resolve customer requests before escalating to staff (AV team, by end of 2024)
   - Respond to all direct email requests to the AV team within 4 business hours (AV team, yearlong goal)
   - Define Service Catalog items specific to infrastructure within ServiceNow, so that the proper information is collected for those requests at ticket creation time (Infrastructure, by end of February 2024)
   - Configure ServiceNow to autocreate tickets for recurring SOP events on a set schedule (Infrastructure, by end of January 2024)
   - Streamline the new hire workflow to automate infrastructure/Tier 2 steps (Infrastructure/Support, by end of March 2024)

4. **Improve outreach and two-way communication with the UP community**
   - Schedule and hold a Banner User Group meeting during the Spring 2024 term. (Banner team, by end of Spring 2024)
   - Have at least two team meetings a term that include student workers so that they can both weigh in on the impact of support processes and learn more about the internal workings of the department (led by Customer Support team, yearlong)

Departmental Objective #2: Cultivate project and process management

The need: One of the biggest gaps in higher education generally, and at UP specifically, lies in knowing how to progress from having a great idea to executing a successful project. Project Management is a critical skill that we put on many of our job descriptions, particularly in project-heavy roles within Information Services.

Closely related is the field of **process mapping and design**, the practice of understanding the sequences of steps that drive so many of the activities in an organization. When the steps of an existing process are clearly documented, it becomes much easier to identify possible improvements or possible automations that make everybody's job easier.

This is an important early objective for IS because establishing a culture of strong project and process management gives us a powerful set of tools for pursuing future strategic goals. As we build this culture, we also hope to serve as a model to help the rest of UP think in terms of these execution skills as well.

Alignment to the UP strategy: At a base level, the better IS can be at completing projects, the more we can do to assist in the success of all strategic initiatives that involve technology. Our success in recognizing and fixing frustrating processes can also help make staff more efficient and engaged in meaningful work, was well as potentially helping us consolidate on fewer technology platforms to save expenses.

Measurable Goals for 2024:

1. **Develop the Information Services staff's skills at project and process management.**
    • Hold at least one workshop each in process analysis and basic project management for IS staff. (CIO, goal is to set workshops to take place during Summer 2024)
    • Based on this training, set further goals for applying learned skills for the second half of 2024 (led by CIO, before Fall 2024)

2. **Work with administrative staff to digitally transform and improve business processes**
    • Hold at least 2 process collaboration meetings with departments to discuss and prioritize potential improvements (Enterprise Architect, by end of February 2024)
    • Replace 10 existing paper or nonintegrated forms with digital workflows leveraging existing UP automation platforms such as DynamicForms or Etrieve. (Enterprise team, by end of June 2024)

Departmental Objective #3: Support and shepherd UP's data journey

The need: Information Services plays a critical role in developing the data infrastructure and services available at the University. In coordination with partners in Institutional Research and all the administrative offices, we have built UP's current data capabilities and must take a leadership role in making data a true resource for decision making, planning, and assessment.

Our efforts to begin this effort will be focused on building partnerships, documenting our current assets and resources, and researching possible paths forward. It will take real investment to develop additional data infrastructure or contract with partners for it, and it will require major efforts in our skillset to properly plan for, implement, and manage the new systems.

Alignment to the UP strategy: While very few of UP's strategic goals explicitly mention data, most of them rely on it. Consistent and accurate data is critical in reporting as we improve enrollment, retention, and advancement; reliable integrations and automations can take work burden off of administrative staff and save money, and a robust system is easier to protect against cyber attacks and other risk.

Measurable Goals for 2024:

1. **Evolve the centralized data resources that will enable future data projects**
    • Complete 150 entries (data definitions) in the Business Glossary and review them for accuracy and clarity. (Data work group, by end of March 2024)
    • Get Oracle Database Gateway working with Microsoft SQL Server to improve cross-application data reporting (DB administrator, by end of February 2024)

2. **As data needs at UP evolve, work with stakeholders to develop further goals for 2024**   • Schedule and hold a meeting of the Data Governance committee to set priorities and next steps. (CIO/Enterprise Architect, by end of Spring 2024)

Long-term Goals for 2024-2026

Leadership Team Objective: Make UP a great place for a tech career

The need: As technology becomes more and more specialized, it becomes harder to attract and retain in-demand specialized technology staff to cover UP's needs. Very rarely will be able to compete directly on salary alone, even taking into account the benefits and strong institutional purpose UP also offers. What we can do, however, is build an engaging and welcoming environment where our team feels they can do their best work.

This is a long road of constant evolution and continuous improvement, as well as a process that needs to work hand in hand with Human Resources. Our leadership team will be tasked with this effort, including setting some target goals to measure progress.

Alignment to the UP mission: UP seeks to be an employer of choice, and this work aligns completely with that goal. Staff who are engaged and motivated can also help create a more positive community across the entire University.

ATSI Team Objective: Reinvigorate our academic technology support

The Academic Technology Services and Innovation team is smaller than it was four years ago, and especially in the transition back to campus from remote learning the team hasn't been as visible or accessible to faculty as before. Faculty have in fact wondered how to get help with Moodle, guidance on how to find and use new instructional resources, or assistance in pursuing innovative ideas.

For this year, efforts on improving our academic technology support will be centered on the ATSI team's efforts to build better channels of communication so that they can be more visible to our community as well as more aware of what the big needs and questions are among the faculty.

Alignment to the UP mission: A fully capable ATSI organization will help drive a better learning experience for our students, both in and outside of the classroom; will reduce frustration and encourage professional development among faculty as we build out our training and support resources; and will provide the infrastructure necessary for proposed innovative non-credit, hybrid, or other programs that rely on increased technology capabilities and training.

Information Security Team Objective: Build our long-term cybersecurity capabilities

The threat of cyber attacks continues to pose significant risk to every organization and company in the world. In addition to the direct risk of attacks, we face increased compliance requirements from legislation, accreditation requirements, and other regulations. We need to keep evolving, not just to keep up with changing needs but to be ready for the future.

The information security team will continue to work on this goal, exploring ways to improve current practices to meet compliance requirements while also researching bigger solutions for improving our overall capabilities. Long-term success will likely require some new investment, but our work now can help lay the groundwork for finding those extra resources.

Alignment to the UP mission: One major malicious cyberattack could have huge ramifications on the University's reputation and finances, drawing far too much attention away from the key aspects of the mission.

Trends to watch for the future

Our strategic priorities for 2024 are selected to set up Information Services to pursue further strategic goals in the years beyond. We expect data management to continue to be a key strategic need long into the future as UP becomes better equipped to make data-driven decisions, but we also believe the operational improvements made in service of customer experience and process/project management will lay the groundwork for future work.

As we look forward, there are several key future strategic needs IS will be closely tracking and considering as potential strategic priorities in 2025 and 2026. High-profile examples include:

- Ramping up from process analysis to full-fledged effort to implement **Digital Transformation** across administrative and academic departments, with a focus on leveraging our current technology to automate and digitalize existing processes, clean up and consolidate existing online processes, and build more efficiency and accuracy into the basic work processes of the University.
- An earnest department-wide delve into **Artificial Intelligence** so that we can better leverage its capabilities in our work and increase our skills so we can support and build policies and resources for UP faculty, staff, and students
- While UP currently hosts many of its applications on-site, we may see reason to **integrate the cloud into our infrastructure** and begin building out our cloud-based capabilities for improved flexibility and capability and cost savings.
- As we harden and mature our technology, it provides the opportunity to examine our solutions with a broader **inclusive** lens with a goal of maximizing the benefits of technology for our entire community.

Next Steps

The strategic plan for 2024 focuses on the most important improvements Information Services needs to make both to improve our ongoing operations and to set up future success. In future years, objectives may include pursuing these same areas of improvement even further, applying new skills such as process and project management to further University of Portland strategic initiatives, or leveraging the added effectiveness gained through application of these improvements to open up more time for building professional skills in emerging technology fields such as generative artificial intelligence or next-generation Enterprise Resource Planning architectures.

This plan includes two additional important key steps as part of its implementation, and as such, these two steps will be tracked as additional goals:

1. **Each quarter of 2024 hold a goal review meeting.**
  • This will include meetings at multiple levels, from IS management to individual teams.
  • Goal progress will be measured and recorded, and goals will be updated when appropriate.

2. **Develop the IS Strategic Plan for 2025 in final quarter of 2024.**   • This process will include lessons learned from our 2024 strategic goals as we strive to set meaningful and measurable targets.